

# **ASSESSMENT ENGINEER'S REPORT**

**Prepared for the**

**CITY OF SAN DIEGO**

**Kings Row  
Maintenance Assessment District**

**Annual Update for Fiscal Year 2005**

**under the provisions of the**

**San Diego Maintenance Assessment District Ordinance  
of the San Diego Municipal Code**

**and**

**Landscape and Lighting Act of 1972  
of the California Streets and Highways Code**

**Prepared by**

**BOYLE ENGINEERING CORPORATION  
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(858) 268-8080**

**May 2004**

# **CITY OF SAN DIEGO**

## **Mayor**

Dick Murphy

## **City Council Members**

Scott Peters District 1	Brian Maienschein District 5
Michael Zucchet District 2	Donna Frye District 6
Toni Atkins District 3	Jim Madaffer District 7
Charles Lewis District 4	Ralph Inzunza, Jr. District 8

## **City Manager**

P. Lamont Ewell

## **City Attorney**

Casey Gwinn

## **City Clerk**

Charles G. Abdelnour

## **City Engineer**

Frank Belock

## **Assessment Engineer**

Boyle Engineering Corporation

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# Assessment Engineer's Report

## Kings Row

## Maintenance Assessment District

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### Preamble

Pursuant to the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscape and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIID of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"), in connection with the proceedings for the KINGS ROW MAINTENANCE ASSESSMENT DISTRICT (hereinafter referred to as "District"), BOYLE ENGINEERING CORPORATION, as Assessment Engineer to the City of San Diego for these proceedings, submits herewith this report for the District as required by California Streets and Highways Code Section 22565.

FINAL APPROVAL, BY RESOLUTION NO. \_\_\_\_\_ ,  
ADOPTED BY THE CITY COUNCIL OF THE CITY OF SAN  
DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, ON THE  
\_\_\_\_\_ DAY OF \_\_\_\_\_, 2004.

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Charles G. Abdelnour, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

## Executive Summary

**Project:** Kings Row  
Maintenance Assessment District

**Apportionment Method:** Equivalent Benefit Unit (EBU)

	<b>FY 2004</b>	<b>FY 2005 <sup>(1)</sup></b>	<b>Maximum Authorized</b>
<b>Total Parcels Assessed:</b>	66	66	--
<b>Total Estimated Assessment:</b>	\$5,956	\$5,956	--
<i>Zone 1</i>	\$5,186	\$5,186	--
<i>Zone 2</i>	\$770	\$770	--
<b>Total Number of EBUs:</b>	66.00	66.00	--
<i>Zone 1</i>	43.00	43.00	--
<i>Zone 2</i>	23.00	23.00	--
<b>Assessment per EBU:</b>			
<i>Zone 1</i>	\$120.60	\$120.60	\$120.60
<i>Zone 2</i>	\$33.48	\$33.48	\$396.97 <sup>(2)</sup>

<sup>(1)</sup> FY 2005 is the City's Fiscal Year 2005, which begins July 1, 2004 and ends June 30, 2005. Total Parcels Assessed, Total Estimated Assessment, and Total Number of EBUs may vary from prior fiscal year values due to parcel changes and/or land use re-classifications.

<sup>(2)</sup> Maximum Authorized annual amount subject to cost indexing provisions as set forth in this Assessment Engineer's Report. Fiscal Year 2004 maximum authorized annual assessment increased by cost indexing factor of 3.35%.

**District History:** The District was established in Fiscal Year 1994. Zone #2 was annexed into the District as part of the Fiscal Year 2001 proceedings.

**Annual Cost Indexing:** An increase of assessments, under authority of annual cost indexing provisions (for Zone #2), is required for Fiscal Year 2005.

**Bonds:** No bonds will be issued in connection with this District.

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## Background

The Kings Row Maintenance Assessment District (District) was originally established in March 1994 to provide for maintenance of landscaping along a noise abatement wall fronting Euclid Avenue. New areas may be added to the District by annexation proceedings.

In 2000, Carter Reese & Associates petitioned the City of San Diego (City) for annexation of the Village at Euclid development into the District (as Zone #2). Zone #2 was successfully annexed into the District as part of the Fiscal Year 2001 proceedings.

The annexation of Zone #2 provides for additional maintenance of landscaping along Euclid Avenue and Ocean View Boulevard. The approximate location of District improvements is shown in Exhibit A.

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## District Proceedings for Fiscal Year 2005

This District is authorized and administered under the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscape and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIII D of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"). This report has been prepared in compliance with Assessment Law.

The purpose of the proposed proceedings and this Assessment Engineer's Report is to update the District budget and assessments for Fiscal Year 2005. The Fiscal Year 2005 assessments proposed within this Assessment Engineer's Report do not represent an increase from the previous year's assessments. Therefore, the vote requirements of Section 4 of Article XIII D do not apply to these proceedings.

A public hearing will be scheduled where public testimony will be heard by the Council, and the Council may, at its discretion, adopt a resolution ordering the levying of the proposed assessments.

## **Bond Declaration**

No bonds will be issued in connection with this District.

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## **District Boundary**

The Boundary Map & Assessment Diagram for the Kings Row Maintenance Assessment District is on file in the Maintenance Assessment Districts Section of the Park and Recreation Department of the City of San Diego and by reference is made a part of this report. A reduced copy of the Boundary Map & Assessment Diagram for the District is included as Exhibit A.

The Boundary Map & Assessment Diagram details the District boundary, zone boundaries, and approximate location of improvements. As shown in Exhibit A, the District has been divided into two zones for benefit apportionment purposes.

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## **Project Description**

The project to be funded by the proposed assessments is the maintenance of landscaping along a noise abatement wall fronting Euclid Avenue within Zone #1. Zone #2 includes provision for additional maintenance of landscaping along Euclid Avenue and Ocean View Boulevard. The approximate location of District improvements is shown in Exhibit A.

Maintenance activities include, but are not limited to, turf mowing, edging and aeration, irrigation, revegetation and replacement of damaged plant material, tree and bush trimming, fertilizing, weeding, ongoing inspection and repairs.

The engineering drawings for the improvements to be maintained by the District are on file at Map Records in the City Engineer's office and are incorporated herein by reference. The specifications for maintenance to be performed will be contained in a future City contract and will be consistent with City standards on file with the Park and Recreation Department.

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## Separation of General and Special Benefits

Consistent with City policy for the public at large, the City will provide the District with annual contributions from the Gas Tax Fund for median maintenance (18.6¢ per square foot of landscaped median and 1.34¢ per square foot of hardscaped median) and from the Environmental Growth Fund for open space maintenance (\$26.63 per acre). These cost allocations are considered to be “general benefit” administered by the District. All other maintenance, operations, and administration costs associated with the District, which exceed the City’s contribution to the public at large, and are accordingly considered to be “special benefit” funded by the District. As currently planned, the benefits of District improvements are considered entirely “special benefits.”

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## Cost Estimate

### Estimated Costs

Estimated Fiscal Year 2005 annual expenses, revenues, reserves, and assessments (provided by the City) are included as Exhibit B hereto.

### Annual Cost Indexing

With the passage of Proposition 218, any proposed increase in assessments must be placed for approval before the property owners by a mail ballot and a public hearing process, similar to these proceedings. A majority of ballots received must be affirmative for the City Council to confirm and levy the increased assessments. For small assessment districts or districts with relatively low dollar assessments, the cost of an engineer’s report, balloting, and the public hearing process can potentially exceed the total cost of the increase. These incidental costs of the proceedings can be added to the assessments, resulting in even higher assessments.

Indexing assessments annually to the San Diego Consumer Price Index for Urban Consumers (SDCPI-U), as approved by the District property owners in Fiscal Year 2001 within Zone #2, allows for minor increases for normal maintenance and operating cost escalation without incurring the costs of the Proposition 218 ballot proceedings. Any



significant change in the assessment initiated by an increase in service provided or other significant changes to the District would still require the Proposition 218 proceedings and property owner approval.

The maximum authorized assessment established in the Zone #2 annexation proceedings are authorized to be indexed (increased) annually by the factor published in the SDCPI-U. Fiscal Year 2002 was the first year authorized for such indexing. It has been determined that an increase of assessments, as authorized by the cost indexing provisions, is required for Fiscal Year 2005.

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## Method of Apportionment

### Estimated Benefit of the Improvements

The Transportation Element of the City's General Plan and the general policy recommendations found in the local Community Plan establish several goals for the community's transportation system and urban design features. The improvements being maintained by this District are consistent with the plans' goals for safety and pleasing aesthetics.

### Apportionment Methodology

The total maintenance assessment for a given parcel is equal to the parcel's total equivalent benefit units (EBUs) multiplied by the unit assessment rate, as shown in the following equation:

$\text{Total Assessment} = \text{Total EBUs} \times \text{Unit Cost Per EBU}$
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### Equivalent Benefit Unit (EBU)

Due to the homogeneous nature of the land use within the District (i.e., entirely single family residential parcels) and relative uniformity of benefit to the respective parcels within each zone, each parcel within a given zone will be assessed equally (i.e., each parcel will be assigned 1 EBU). In other words, the total cost of maintaining improvements within a given zone will be equally assessed to all properties within the zone.

### Unit Assessment Rates

For each zone, the unit assessment rate for maintenance (unit cost per EBU) is equal to the total maintenance cost divided by the total EBUs:

$$\text{Unit Cost Per EBU} = \text{Total Maintenance Cost} / \text{Total EBUs}$$

As described above, the total assessment assigned to each parcel has been calculated based on the preceding factors. Based on the above methodology, EBUs, unit assessment rates, and total assessment calculated for each parcel can be found in the Assessment Roll (Exhibit C).

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## Summary Results

The District Boundary is presented in Exhibit A.

An estimate of the costs of the improvements provided by the District is included as Exhibit B to this report.

The assessment methodology utilized is as described in the text of this report. Based on this methodology, the EBUs and Fiscal Year 2005 District assessment for each parcel were calculated and are shown in the Assessment Roll (Exhibit C).

Each lot or parcel of land within the District has been identified by unique County Assessor's Parcel Number on the Assessment Roll and the Boundary Map and Assessment Diagram referenced herein. The net assessment for each parcel for Fiscal Year 2005 can be found on the Assessment Roll.

This report has been prepared and respectfully submitted by:

BOYLE ENGINEERING CORPORATION

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Eugene F. Shank, PE C 52792

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David R. Spencer, EIT CA 109078

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the Assessment as shown on the Assessment Roll, together with the Assessment Diagram, both of which are incorporated into this report, were filed in my office on the \_\_\_\_\_ day of \_\_\_\_\_, 2004.

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Charles G. Abdelnour, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the assessment diagram incorporated into this report, was approved and confirmed by the CITY COUNCIL of said City on the \_\_\_\_\_ day of \_\_\_\_\_, 2004.

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Charles G. Abdelnour, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

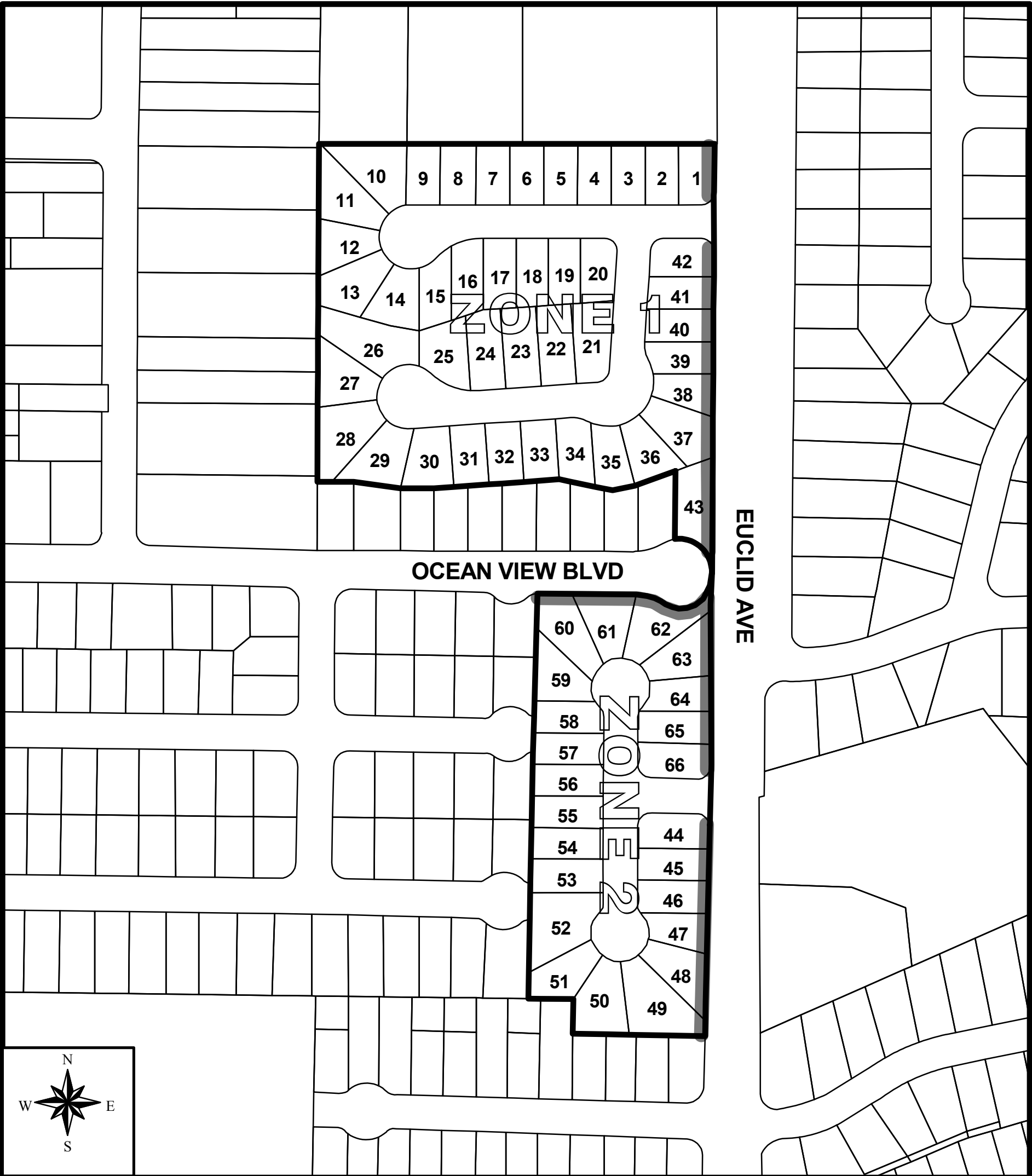
I, \_\_\_\_\_, as SUPERINTENDENT OF STREETS of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the assessment diagram was recorded in my office on the \_\_\_\_\_ day of \_\_\_\_\_, 2004.

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SUPERINTENDENT OF STREETS  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

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# **EXHIBIT A**



BOUNDARY MAP & ASSESSMENT DIAGRAM

FILED IN THE OFFICE OF THE CITY CLERK OF THE CITY OF SAN DIEGO, STATE OF CALIFORNIA, THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2000.

CHARLES G. ABDELNOUR, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

PREPARED BY:  
**BOYLE ENGINEERING CORPORATION**  
7807 Convoy Court, Suite 200, San Diego, California 92111 (858) 268-8080

I HEREBY CERTIFY THAT THE WITHIN MAP SHOWING PROPOSED BOUNDARIES OF THE KINGS ROW MAINTENANCE ASSESSMENT DISTRICT, CITY OF SAN DIEGO, STATE OF CALIFORNIA, WAS APPROVED BY THE CITY COUNCIL AT A REGULAR MEETING THEREOF, HELD ON THE \_\_\_\_ DAY OF \_\_\_\_\_, 2000, BY ITS RESOLUTION NO. \_\_\_\_\_.

CHARLES G. ABDELNOUR, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

AN ASSESSMENT WAS LEVIED BY THE CITY COUNCIL OF THE CITY OF SAN DIEGO ON THE LOTS, PIECES, AND PARCELS OF LAND SHOWN ON THIS ASSESSMENT DIAGRAM. SAID ASSESSMENT WAS LEVIED ON THE \_\_\_\_ DAY OF \_\_\_\_\_, 2000; SAID ASSESSMENT DIAGRAM AND THE ASSESSMENT ROLL WERE RECORDED IN THE OFFICE OF THE SUPERINTENDENT OF STREETS OF THE CITY OF SAN DIEGO, STATE OF CALIFORNIA ON THE \_\_\_\_ DAY OF \_\_\_\_\_, 2000. REFERENCE IS MADE TO THE ASSESSMENT ROLL RECORDED IN THE OFFICE OF THE SUPERINTENDENT OF STREETS FOR THE EXACT AMOUNT OF EACH ASSESSMENT LEVIED AGAINST EACH PARCEL OF LAND SHOWN ON THIS ASSESSMENT DIAGRAM.

NOTE: FOR A DETAILED DESCRIPTION OF THE LINES AND DIMENSIONS OF LOTS OR PARCELS SHOWN ON THIS MAP, REFER TO THE COUNTY ASSESSOR'S MAPS WHICH SHALL GOVERN WITH RESPECT TO ALL DETAILS CONCERNING THE LINES AND DIMENSIONS OF SUCH LOTS OR PARCELS.

**LEGEND:**

- District Boundary
- District Improvements
- Parcel Line
- Diagram Number



CITY OF  
SAN DIEGO

KINGS ROW  
MAINTENANCE ASSESSMENT DISTRICT

W.O. | DATE: MAY 2000 | REVS:

# **EXHIBIT B**

# **EXHIBIT B - Estimated Annual Expenses, Revenues & Reserves** **Kings Row Maintenance Assessment District**

	FY 2003 ESTIMATE	FY 2004 ESTIMATE	FY 2005 PROPOSED
<b>BEGINNING BALANCE AND RESERVE</b>			
Beginning Balance	\$ 2,611	\$ 3,900	\$ 4,529
Prior Year Encumbrances	\$ 184	\$ -	\$ -
<b>TOTAL BALANCE</b>	<b>\$ 2,795</b>	<b>\$ 3,900</b>	<b>\$ 4,529</b>
<b>REVENUE</b>			
Assessments	\$ 5,685	\$ 5,956	\$ 5,956
Interest	\$ 126	\$ 134	\$ 134
Environmental Growth Fund	\$ -	\$ -	\$ -
Gas Tax Fund	\$ -	\$ -	\$ -
General Fund	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -
<b>TOTAL REVENUE</b>	<b>\$ 5,811</b>	<b>\$ 6,090</b>	<b>\$ 6,090</b>
<b>TOTAL BALANCE AND REVENUE</b>	<b>\$ 8,606</b>	<b>\$ 9,990</b>	<b>\$ 10,619</b>
<b>EXPENSE</b>			
CAPITAL IMPROVEMENTS PROGRAM	\$ -	\$ -	\$ -
OPERATING EXPENSE			
Personnel	\$ 1,951	\$ 2,205	\$ 2,394
Contractual	\$ 1,009	\$ 1,323	\$ 1,389
Incidental	\$ 1,033	\$ 1,008	\$ 1,044
Utilities	\$ 713	\$ 925	\$ 981
<b>TOTAL OPERATING EXPENSE</b>	<b>\$ 4,706</b>	<b>\$ 5,461</b>	<b>\$ 5,808</b>
<b>TOTAL EXPENSE</b>	<b>\$ 4,706</b>	<b>\$ 5,461</b>	<b>\$ 5,808</b>
<b>RESERVE</b>			
Contingency Reserve	\$ -	\$ -	\$ 4,811
<b>TOTAL RESERVE</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 4,811</b>
<b>BALANCE</b>	<b>\$ 3,900</b>	<b>\$ 4,529</b>	<b>\$ -</b>
<b>TOTAL EXPENSE, RESERVE AND BALANCE</b>	<b>\$ 8,606</b>	<b>\$ 9,990</b>	<b>\$ 10,619</b>



# **EXHIBIT C**

Due to the size of the Assessment Roll (Exhibit C), only limited copies are available. Please contact the City of San Diego, Park & Recreation Department, Open Space Division, Maintenance Assessment Districts Program at (619) 685-1350 to review the Assessment Roll.